



Federal Student Aid (FSA) Financial Partners Portal Rollout – Release 2

User Acceptance Test (UAT) Test Plan



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1.0 User Acceptance Test Overview

The User Acceptance Test Plan provides an overview of the testing necessary to ensure that the functionality delivered meets the needs of the target user identified for the Financial Partners Portal Rollout for Release 2. Included in this document is a list of detailed items that will be incorporated into test scripts and applied in the User Acceptance Testing.

The main purposes of User Acceptance Test was to:

- Serve as formal system acceptance.
- Verify Application Functionality.
- Validate all of the above within a user acceptance test environment.

Entry Criteria for User Acceptance Test Execution:

- All applications and application components necessary for cycle to be completed have been inventoried and promoted.
- System Test is complete.
- No high priority defects remain from System Test.
- Test Readiness Review has been conducted.
- User Acceptance Test Plan is complete.
- Resources to execute tests are available.
- All UAT test scripts have been dry-run by the Portals team and members from the FP channel.
- The User Acceptance Test environment is in place.

Exit Criteria for User Acceptance Test:

- User Acceptance Test (UAT) deliverable has been completed and reviewed by IV & V.
- All test cases and conditions have been executed successfully.
- Identified errors and defects have been corrected and re-tested.
- All issues and incidents have been properly documented and worked through the resolution process.
- All reviews were conducted, and that the review yields satisfactory results.



2.0 User Acceptance Test Scope

User Acceptance Test cases will be based on the following:

- Users of Financial Partners Portal
- Application Functionality

3.0 Roles and Responsibilities

User Acceptance Testing involved a Financial Partners Channel user group and the Portals Rollout Testing Team. The primary role for the User Acceptance Testing effort was the Financial Partners Channel User Group with assistance from the Test Team Analysts. The roles are described below:

3.1 Financial Partners Channel User Group

- Execute the User Acceptance tests.

3.2 Test Team Analysts

- Assist in the development of the User Acceptance Test Plan.
- Evaluate the User Acceptance test results
- Report all incidents and problems encountered during testing activities.

Ms. Teale Taggart, Ms. Anne Jensen, and Bryan Hykes will serve as the Test Team Analysts.

3.3 Test Team Lead

- Define a User Acceptance Test Plan.
- Define User Acceptance test cases and scripts with input from the FP channel.
- Monitor the testing process to identify problems, mitigate potential risks and schedule slippage.



- Review test results with the test team to clarify questions, concerning system functionality and discrepancies with expected results, and ensured that the user acceptance testing activity was a valid and complete exercise.
- Certify that the testing process was comprehensive in scope and complete manage the execution of user acceptance tests.

Erick Middleton will serve as the Test Team Lead

4.0 Developing Test Cases

The Financial Partner UAT test cases were developed to mimic real world scenarios and test requirements for Release 2. The test cases were created based on requirements from the Financial Partners Requirements Traceability Matrix. The test scripts were developed based on the test cases identified in the test plan. The test scripts will guide the user through each scenario.

4.1 Executing and Validating Test Cases

Each test case was designed as a discrete, executable exercise that would return a predictable result. Test Cases included a setup, input, and expected result sections. Each test case was designed to verify the functionality of a business scenario and described step by step how the business scenario was being tested.

The actual test results were then compared to the expected results to determine if the test ran correctly, “Pass” (or incorrectly, “Fail”) by the Test Team Analyst executing the case.

A “discrepancy” was defined as the difference between what was *expected* to happen and what *actually* happened. Discrepancies were initially evaluated to ensure that they represent system defects. The initial evaluation of discrepancies included:

- Review of the test data;
- Review of the test environment;
- Review of test scripts;



- Review of actual system functioning.

If it was determined that the “discrepancy” represented a system defect, the incident was forwarded to the development team for assessment and proposed solution. After successfully testing the modification, the incident was designated as “closed” by the Test Team Lead.

Validation of a test case occurred when the specific test activity has a status of “Pass” and was reviewed by the Test Team Lead. Completion of User Acceptance Testing was dependent upon each test activity having a status of “pass”.

Each test case will be executed by the Financial Partners Channel User Group in the test environment. The test environment is isolated logically on a server, but the server is shared with other applications. Only users who know the ID/PWD can login to Financial Partners portal. The Test Team Analyst will login to the Financial Partners portal before User Acceptance Test (UAT) is set to begin.

****Note:** All tests objects are under Configuration Management control and are stored in Visual Source Safe.

4.2 SIR Tracking Process

While executing the test cases, the Financial Partners Channel User Group will keep track of issues and enhancements they find using the R2 Financial Partners Feedback form. The issues and enhancements received will be entered into ClearQuest by a Test Team Analyst. ClearQuest will be used to record and manage system defects. The Test Team Analyst will assign a degree of severity (1-Critical, 2-Average, 3-Minor, 4-Enhancement) and assign it to the appropriate developer to make the fix.

Critical defects are critical in nature and result in full or partial system failure, do not have acceptable workarounds, and demand immediate action. Average defects are non-critical in nature resulting in intermittent system failure or problems, do have acceptable workarounds, and do not prohibit the users from performing their tasks. Minor defects do not stop system operation, do have acceptable workarounds, are cosmetic in nature, have minimal effect on the system, do not prohibit the users from performing their tasks, and have the least priority.

When the issue has been resolved, the Test Team Analyst will test the modification and mark the incident as “closed” if the problem has been fixed. The Financial Partners portal page, where the problem was found, will also be regression tested. If the problem has not been fixed, the Test Team Analyst will mark the incident as unresolved and assign it to the appropriate developer to make the fix. This process will continue until the incident is marked as closed.



5.0 Test Scenarios/Cases

The following is a list of test cases, which will be used to write detailed test scripts. Detailed test scripts with expected results will be documented for each item listed below.

5.1 FP Portal User I

- Search categorically for Secondary Markets by choosing a letter
- Complete a search for Secondary Markets using the Community Locator
- Send email by clicking on an individual's email address on the organization chart
- View the reorganized Publications page

5.2 FP Portal User II

- Search categorically across 'ALL' Community Members
- Complete a search for Direct Loan Schools using the Community Locator
- Search categorically for Direct Loan Schools by entering a query
- Search for State Contact Information
- Submit feedback from the Loan and Grant Resources page

5.3 FP Portal User III

- Search the What's New page for recent news and/or postings
- Search for new Interest Rate Information
- Click the THOMAS link
- Check the FSA Organization Charts
- View the Map Legend with text describing the color scheme of the map

5.4 FP Portal User IV

- View the reorganized Loan and Grant Resources page
- Click the Students Portal link at bottom and top of Loan and Grant Resources page
- Send email to mail to fpportal@ed.gov to inform the team of new entries from the Community Calendar page
- Execute a search of the Department of Education site from the Search/Advanced Search Results page
- Click the user buttons on the FMS page



5.5 FP Portal User V

- Search categorically for Lenders by choosing a letter
- Verify the Lender information
- Click the CFO Organization Chart link
- Click the Department of Education Employee Locator link

5.6 FP Portal VI

- Execute an Advanced Search on Forms 2000
- Click the Department of Education link on Advanced Search Results page
- Check the Modified Date on the Lender Payment Process Redesign (Old Form 799) page
- Verify that each document on the Publications page has a document format tag



6.0 Overall Testing Schedule

The project plan dates for testing activities are:

WBS	Task Name	Duration	Start	Finish	% Complete	resource	source in
43	79.1.4	66 days	Fri 6/28/02	Fri 9/13/02	0%		
44	79.1.4.33	11 days	Fri 6/28/02	Fri 7/12/02	0%		EM
45	79.1.4.34	20 days	Fri 7/5/02	Thu 8/1/02	0%		EM
46	79.1.4.35	5 days	Mon 7/8/02	Fri 7/12/02	0%		
47	79.1.4.55.1	5 days	Mon 7/8/02	Fri 7/12/02	0%		EM
48	79.1.4.55.2	1 day	Fri 7/12/02	Fri 7/12/02	0%		EM/MW,JD
49	79.1.4.35	20 days	Mon 7/29/02	Fri 8/23/02	0%		
50	79.1.4.35.1	20 days	Mon 7/29/02	Fri 8/23/02	0%		
51	8.1.4.35.1.5	20 days	Mon 7/29/02	Fri 8/23/02	0%		EM/MW,JD
52	8.1.4.35.1.1	20 days	Mon 7/29/02	Fri 8/23/02	0%		AB,EM
53	8.1.4.35.1.6	20 days	Mon 7/29/02	Fri 8/23/02	0%		EM/MW,JD
54	8.1.4.35.1.7	20 days	Mon 7/29/02	Fri 8/23/02	0%		EM/MW,JD
55	8.1.4.35.1.8	15 days	Mon 8/5/02	Fri 8/23/02	0%		EM/MW,JD
56	79.1.4.35.11	20 days	Mon 7/29/02	Fri 8/23/02	0%		
57	1.4.35.11.1	20 days	Mon 7/29/02	Fri 8/23/02	0%		EM/MW,JD
58	1.4.35.11.2	20 days	Mon 7/29/02	Fri 8/23/02	0%		AB,EM
59	1.4.35.11.2	15 days	Mon 8/5/02	Fri 8/23/02	0%		EM/MW,JD
60	79.1.4.35.6	1 day	Fri 8/23/02	Fri 8/23/02	0%		EM/MW,JD
61	79.1.4.42	10 days	Mon 8/12/02	Fri 8/23/02	0%		
62	79.1.4.42.1	10 days	Mon 8/12/02	Fri 8/23/02	0%		EM/MW,JD
63	79.1.4.42.2	1 day	Fri 8/23/02	Fri 8/23/02	0%		EM/MW,JD
64	79.1.4.46	3 days	Tue 9/3/02	Thu 9/5/02	0%		
65	79.1.4.46.1	1 day	Thu 9/5/02	Thu 9/5/02	0%		EM/CL
66	79.1.4.46.2	2 days	Tue 9/3/02	Wed 9/4/02	0%		CL,EM
67	79.1.4.46.3	1 day	Thu 9/5/02	Thu 9/5/02	0%		EM/MW,JD
68	79.1.4.57	12 days	Thu 8/29/02	Fri 9/13/02	0%		
69	79.1.4.57.7	3 days	Thu 8/29/02	Mon 9/2/02	0%		MW
70	79.1.4.57.8	3 days	Tue 9/3/02	Thu 9/5/02	0%		MW
71	79.1.4.57.9	3 days	Thu 9/5/02	Mon 9/9/02	0%		MW
72	79.1.4.57.10	3 days	Tue 9/10/02	Thu 9/12/02	0%		MW
73	79.1.4.57.1	1 day	Thu 9/12/02	Thu 9/12/02	0%		MW

Note: Any changes in the development timeframes will have significant effect on this plan.



7.0 ISSUES / QUESTIONS

The following issues / questions related to the User Acceptance Test Plan.

Issue	Resolution